

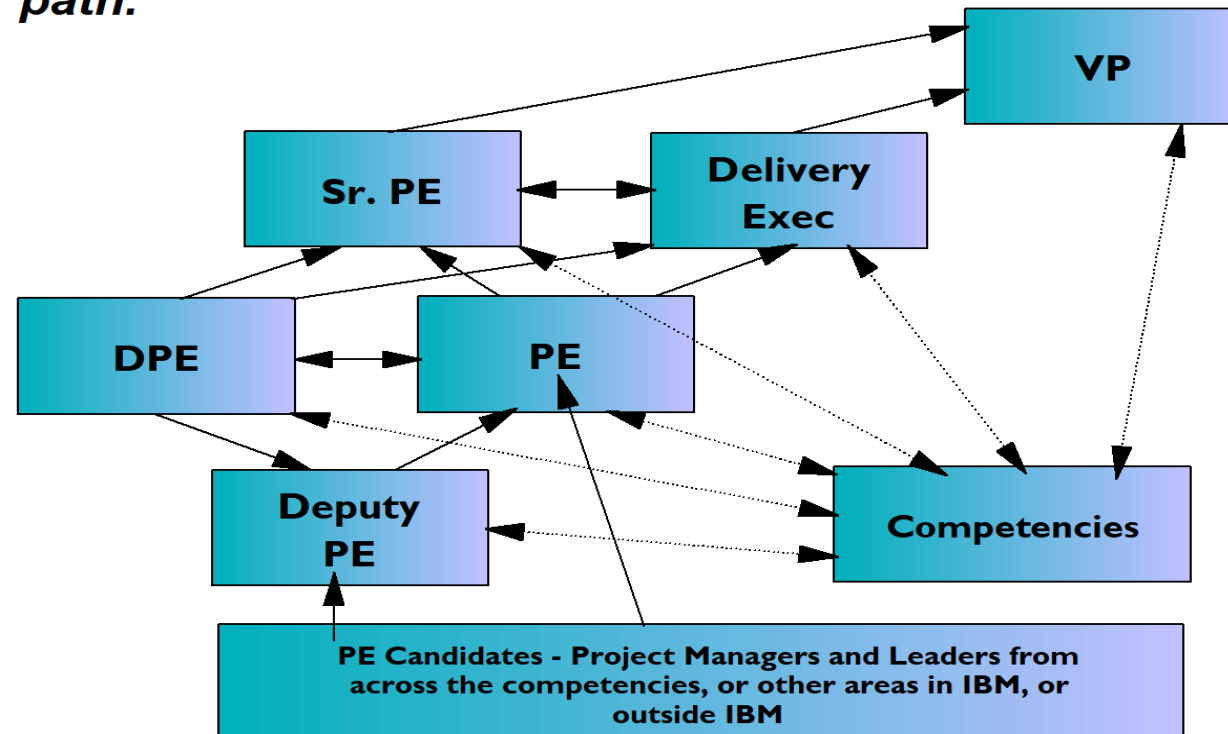
IBM GS SDC South

Account Management Process & Relationships

October 1999

Project Executive Community

The PE has the opportunity to move through multiple levels ... and they can move in and out of alternative jobs along the career path.



Account Management

Project Executive

**Project
Executive**

**Delivery
Project
Executive**

**Delivery
Team**

Role

Customer advocate
Project manager
Focal point to customer executives

Measurements

Customer satisfaction
Schedules
Costs - Profit & Loss

Experience

General business management
Comprehensive I/S knowledge
Extensive project management /
leadership skills
Financial plans and controls
Middle management experience

Focus

Strategic Relationship

Account Management

Delivery Project Executive

**Project
Executive**

**Delivery
Project
Executive**

**Delivery
Team**

Role

Owns ongoing delivery
Focal point for delivery site

Measurements

Customer satisfaction
Service level agreements met
Costs

Experience

Management experience
In-depth I/S background
(technical / operations)
Excellent communications / leadership skills

Focus

Service delivery

Account Management

Delivery Team

**Project
Executive**

Role

Owns ongoing tower delivery
Focal point for tower services

**Delivery
Project
Executive**

Measurements

Customer satisfaction
Service level agreements met
Schedules and Costs

**Delivery
Team**

Experience

In-depth technical background in area of
expertise
Project management / leadership skills
Communications / leadership skills

Focus

Service delivery



Account Management Process

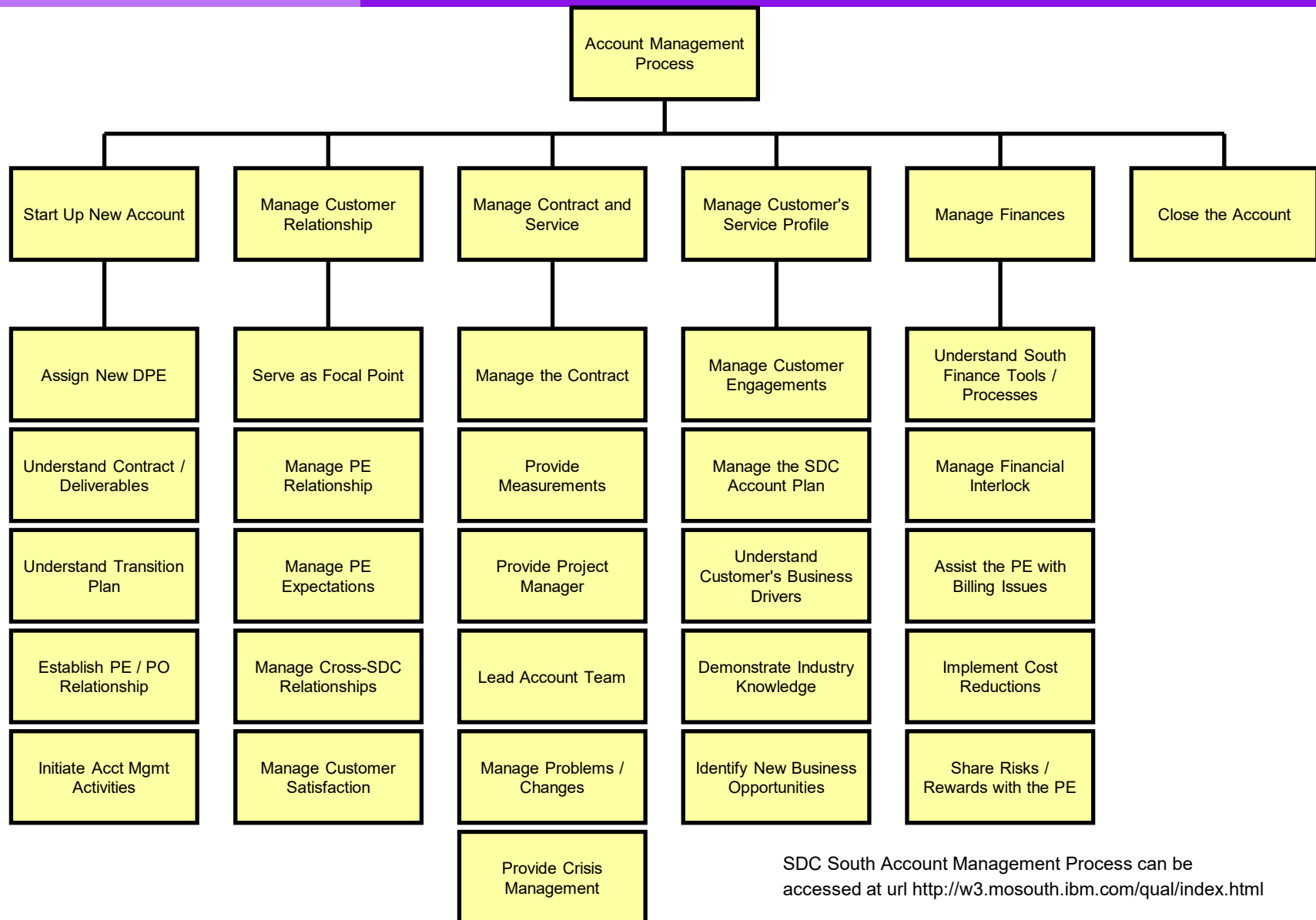
Scope:

To cover all key business aspects of managing the relationship between the customer and SOUTH, and the delivery of contracted services; and of participating in the marketing and negotiation of new services.

Objectives:

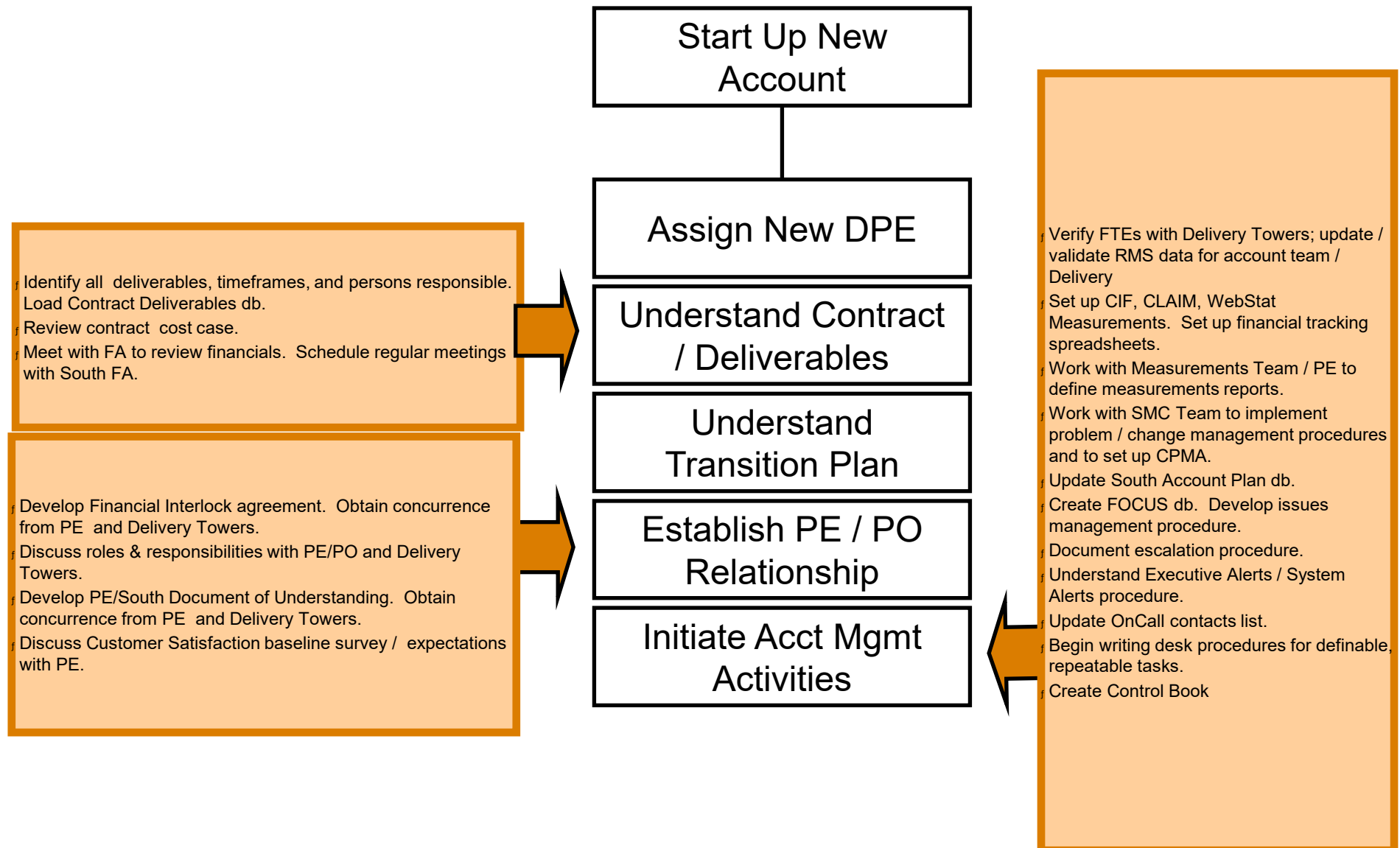
- Ensure a consistent and effective Account Management approach throughout the SOUTH.
 - Identify/ensure ownership, responsibility, accountability, and awareness of account management-related activities.
 - Attain committed PE customer satisfaction goals.
 - Attain committed financial goals.
 - Attainment of these objectives is demonstrated/measured by:
 - f Documented PE DOUs and/or Financial Interlocks.
 - f PE satisfaction survey results.
 - Other indicators of the objectives are:
 - f SOUTH DPEs consistently using the process.
 - f Customer satisfaction survey results.
 - f SLA (Service Level Agreement) measurements.
 - f Financial measurements.
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Account Management Process



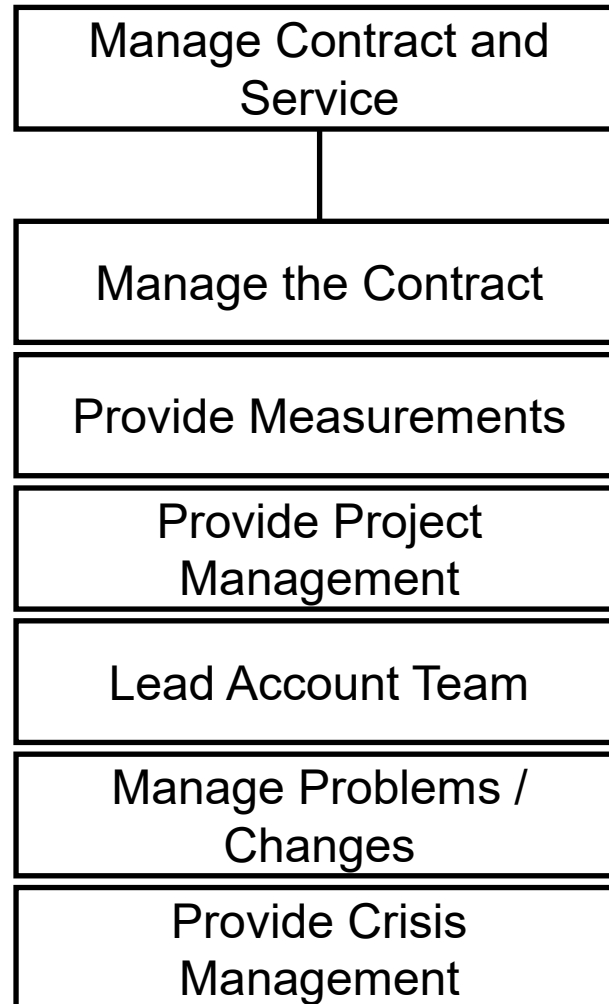
SDC South Account Management Process can be accessed at url <http://w3.mosouth.ibm.com/qual/index.html>

New Account / New DPE



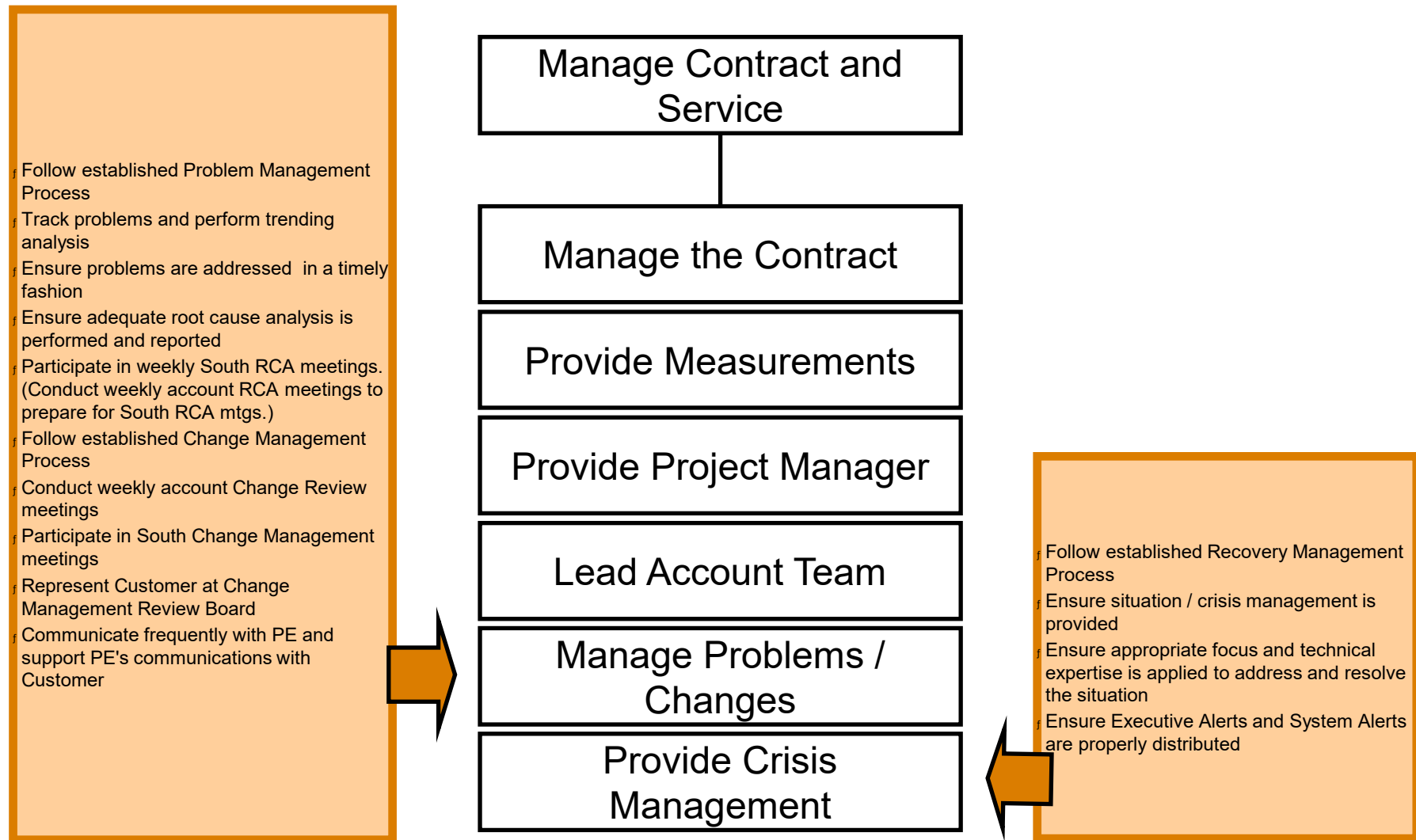
Contract Management

- Understand South service commitments. Ensure delivery of services as committed
 - Track missed commitments. Work with Delivery to develop / manage improvement plans
 - Serve as primary contact for receiving new requirements or changes. Implement a service request procedure. Follow the South Engagement Process.
 - Ensure audit readiness. Maintain a control book
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- Ensure project management is provided for account projects
 - Implement effective project management procedures / tools
 - Manage DOU/Interlock as a project

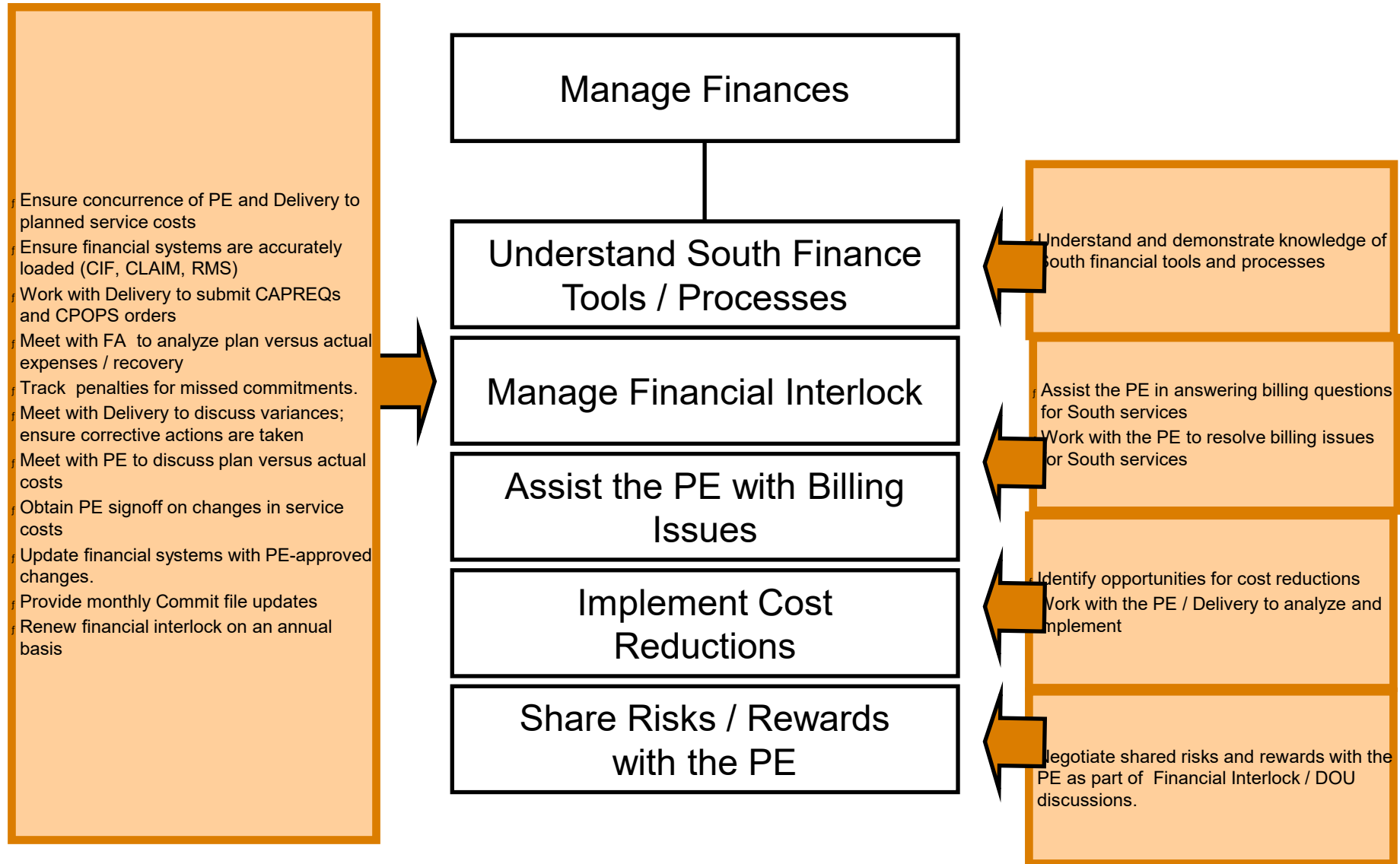


- Execute Measurements Procedure
 - Obtain / analyze measurements data
 - Work with PE and Delivery to develop improvement plans; and manage such plans
 - Provide monthly measurements data to PE
 - Send monthly PE Letter to PE
 - Update WebStat measurements
 - Respond to ad hoc requests (should be infrequent)
 - Renegotiate measurements criteria / data as necessary)
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- Provide leadership to the South account team
 - Perform "matrix management"
 - Serve as focal point for escalations
 - Ensure issues are identified and resolved
 - Assist in setting business strategy and direction
 - Educate Delivery on customer business / industry expectations. Provide regular status on how South is performing against Customer expectations

Contract Management (cont.)



Finances



Customer Relationship

Serve as primary contact into South for PE and Customer
Serve as the South spokesperson for Delivery
Act as primary focal point for OEM vendors if appropriate)
Develop a Communications Plan

Manage Customer Relationship

Serve as Focal Point

Manage PE Relationship

Manage PE Expectations

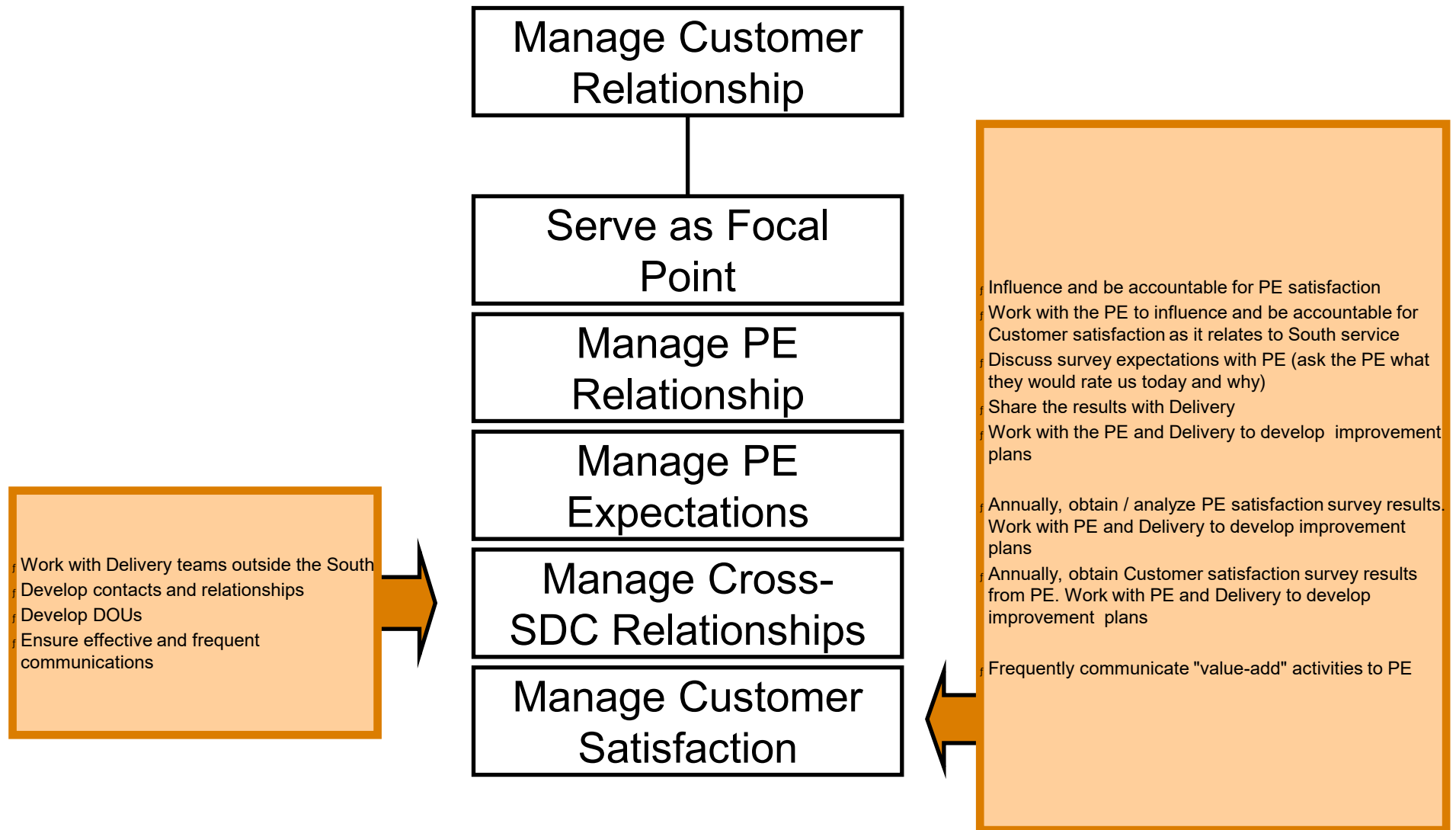
Manage Cross-SDC Relationships

Manage Customer Satisfaction

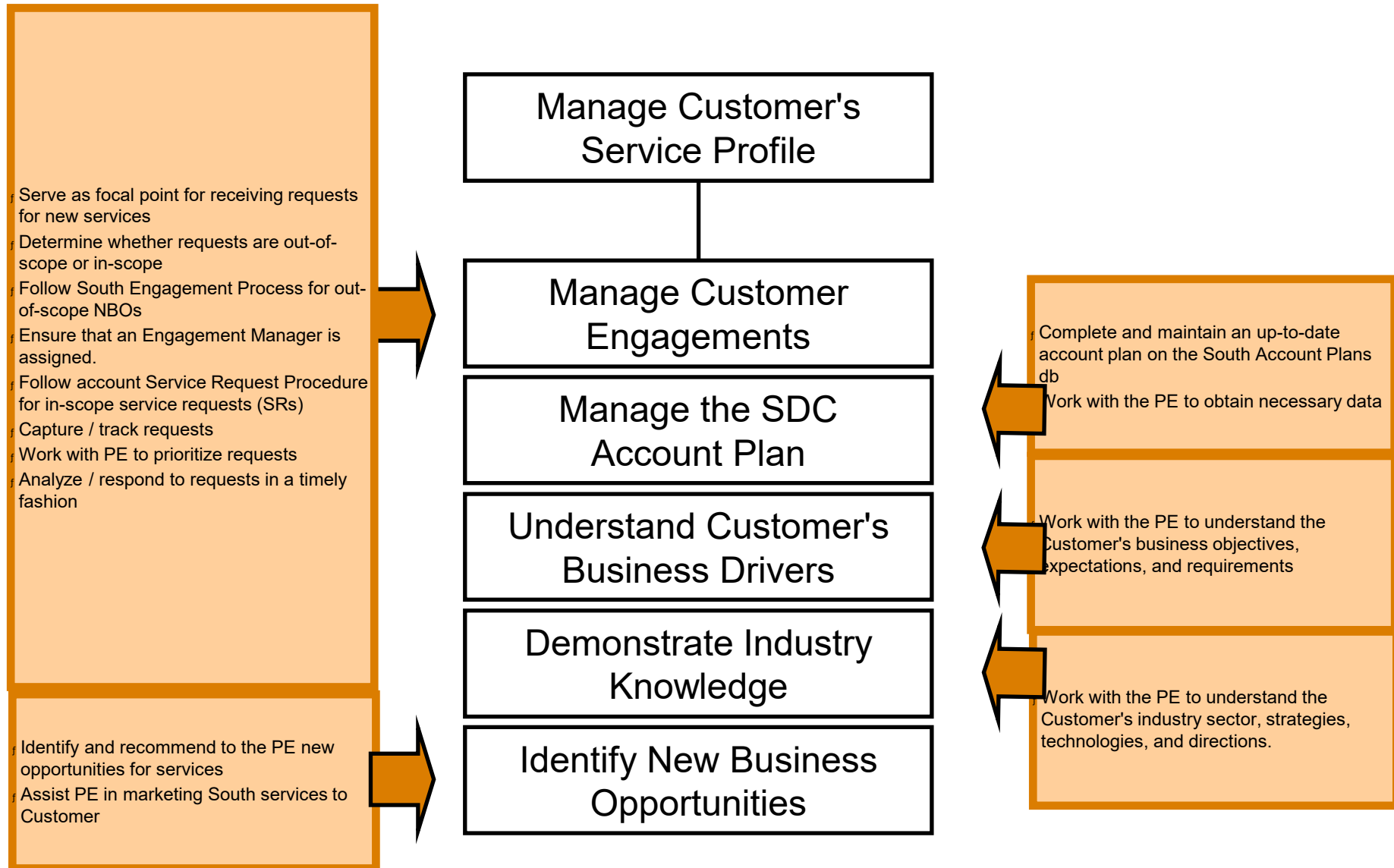
Develop / nurture the PE/PO relationship
Support the PE in developing / nurturing the Customer relationship
Ensure frequent, effective communications with the PE
Support the PE in communications with the Customer

Listen to and understand the needs of the PEs
Support the PE in understanding the needs of the Customer
Be honest and respectful
Deliver on promises; keep commitments; follow up
Be available when the PE needs you
Keep the PE informed
Respond in a timely manner
Only make commitments that you can keep
Work with PE to jointly develop a timely, appropriate responses to the Customer
CAPTURE / PRIORITIZE REQUESTS; implement a service request procedure
CAPTURE / PRIORITIZE ISSUES; implement an issues mgmt procedure (FOCUS)

Customer Relationship (cont.)



Portfolio of Services



Account Team PBCs

- PBC measurements criteria for the commercial account team include:
 - f PE / South DOU and Financial Interlock in place and signed
 - f Customer satisfaction rating ≥ 8.8 for commercial accounts
8.7 for IBM accounts (on a scale of 0.0 to 10.0)
 - f Financial actuals = plan
 - f SLA commitments attained
-

Acct Mgmt Infrastructure Components

- **Contracts / DOUs / Commitments**

- f PE / South DOU
- f Contract Deliverables db
- f South Account Plan db

- **Financial**

- f Financial Interlock
- f Monthly analysis of CIF, CLAIM, RMS, Penalties, Capital/Expense,....
- f Meetings with FA, Delivery, PE to discuss results

- **Measurements**

- f Performance Standards
- f Monthly reports
- f WebStat updates
- f Improvement Plans

- **Project Management**

- f DOU/Interlock as a project
- f Current Projects
- f Methodology / Tools

- **NBOs / Service Requests**

- f South Engagement Process
- f Advantica account SR Procedure / Tool

- **Problem Management**

- **Change Management**

- **Issues Management**

- **Executive Alerts / System Alerts / Crisis Mgmt**

- **Interface with non-South service providers**

- f Other SDCs
- f OEM vendors
- f Contractors

- **Delivery Team interface(s)**

- **Customer Satisfaction Surveys**

- **Control Book**

- **ISO Audit Preparedness**

- f Processes and Desk Procedures
 - f Departmental documentation
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PE / DPE / Delivery Roles & Responsibilities

Project Executive / Office	Service Delivery Project Executive	Delivery Tower Project Manager
OVERALL RESPONSIBILITIES	OVERALL RESPONSIBILITIES	OVERALL RESPONSIBILITIES
<ul style="list-style-type: none"> ▪ Own the contract ▪ Own the overall customer relationship and customer satisfaction <ul style="list-style-type: none"> - Single point of contact for customer - Measure customer satisfaction ▪ Be an advocate to the customer for the service delivery team ▪ Total financial responsibility for the contract ▪ Negotiate on behalf of IBM Global Services for contract amendments and changes ▪ Own all subcontractor/third party relationships that are not owned by service delivery to satisfy the customer's wants/needs ▪ Own all transition plans (from a customer deliverable point of view) ▪ Own project schedules (cause them to be established and reported on) ▪ Proposal leadership for account ▪ Lead the creation of the account plan/strategy on a regular basis ▪ Qualify new business opportunities ▪ Opportunity/requirement identification and closure ▪ Establish and chair the Change Control Board for any changes/addendum ▪ Own all audit compliance reviews and actions 	<ul style="list-style-type: none"> ▪ Own cost management including annual DOU/Interlock plan negotiations ▪ Ensure positive customer satisfaction and customer relationship is maintained Provide PE/O with single point of contact ▪ Own delivering performance standards ▪ Own service quality ▪ Participate in the management of profit and expense with the PE ▪ Continually identify ways to reduce costs of delivering service ▪ Deliver on commitments ▪ Own/manage subcontractor/third party providers not owned by the PO ▪ Provide transition management/staff ▪ Technical design/proposal preparation and/or approval ▪ Participate in account plan/strategy on an agreed to time frame ▪ Opportunity/requirement identification, guidance, support, and closure ▪ Ensure technical support is provided ▪ Participate in the Change Control Board and/or change process ▪ Provide overall leadership and directions to the delivery team 	<ul style="list-style-type: none"> ▪ Provide single point of contact for specific DPE/O ▪ Own cost management including annual DOU/interlock plan negotiations (for specific tower) ▪ Ensure positive customer satisfaction and customer relationship is maintained (for specific tower) ▪ Own delivering performance standards and client measurements (for specific tower) ▪ Own service quality (for specific tower) ▪ Continually identify ways to reduce costs of delivering service ▪ Deliver on commitments ▪ Own/manage subcontractors/third party providers administered by Tower Project Manager ▪ Provide transition management/staff ▪ Technical design/proposal preparation ▪ Opportunity/requirement identification, guidance, support, and closure ▪ Provide technical support ▪ Provide account leadership/direction and project management within tower ▪ Participate in the Change Control Board and/or change control process